

**Report To:** Board of Management – February 2025

**Title of Report:** Tenant Scrutiny Panel Project – Secret Shopper

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**Purpose of Report:** For Information

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Corporate Plan Priority	Homes Customers
Strategic Risk(s)	9: Failure to build an inclusive organisation 10: Failure to effectively engage tenants, the wider community and other key stakeholders
Relevant links: e.g., policy, websites, etc	
Equality Impact Assessment	N/A
Tenant Insights	This paper is based upon work undertaken by our Tenant Scrutiny Panel.

*“Who knows the system best and how it works but those of us living in the properties”*

## 1.0 Recommendations

1.1 **Recommendation one** – Taff to explore opportunities to include the customer “lived experience” in Taff’s training, induction and onboarding for our customer facing roles.  
**Note** Our secret shoppers are very keen to help/input in the design of any induction /training package.

1.2 **Recommendation two** - Taff to have up to date information of all their customers on file.

1.3 **Recommendation three** – That a hearing loop be put in the reception area.

1.4 **Recommendation four** - Consider how best to resource call handling demand.

1.5 **Recommendation five** – when procuring for contractors that part of the contractual requirements should be that they align with Taff values.

## 2.0 Purpose

- 2.1 The purpose of the secret shopper exercise was to gather insights into how.
- Our customer facing services are currently delivering that service (this is a snapshot in time)
  - How our customers experienced that service **and**
  - Provide feedback to our Customer Service team based on the insights, that can help improve the customer experience

## 3.0 Background

- 3.1 As part of Taff's commitment to the continuous improvement of their customer services, one of the most common ways of understanding the customer experience is through the secret shopper exercise. This is a common technique/approach used across both commercial and third sector services. Taff have used the secret shopper exercise in the past.

## 4.0 What we did – methodology

- 4.1 We ran two secret shopper sessions with a total number of 13 secret shoppers in January of this year. The sessions were facilitated by the engagement team. The sessions were designed to be inclusive. The secret shoppers involved in the sessions ranged in age, ethnicity, vulnerability, language, gender, and disability. The activities included:
- Four engagements with reception – face to face
  - Nine engagements with the customer service team.
- 4.2 Each secret shopper session was four hours in length. After each session, the secret shopper shared how they felt and thought about the call or face to face engagement. The group also fed back any observations they had about the call.
- 4.3 All the phone calls were on speaker phone.
- 4.4 In the reception sessions the facilitators were in the back room or in the reception area with the secret shopper to observe and make notes. The secret shopper and the observer went back to the main group to feedback.
- 4.5 Our secret shoppers had a choice of using scenarios we had pulled together or existing issues that were still unresolved for them. Please see appendix one for the sample scenarios.

- 4.6 Most of the scenarios the secret shoppers used were on-going real issues they brought to the secret shopper sessions. This included:
- On-going over crowding
  - Electric meter
  - Sewage pipe in bathroom not working properly
  - Corner of a wall in a communal area has been damaged, and the wheelchair keeps getting caught on the exposed plaster
  - Broken doorframe
  - Ventilation fan not working for the past two years still waiting to be fixed
  - Wrong medicine box key
  - Shower pipe leaking in the bathroom
  - Front door of block closing too quickly
  - Damp and mould.
- 4.7 How quickly Taff responded to our secret shoppers' requests varied but on the whole responses were within a couple of hours of contacting the customer centre.
- 4.8 In a follow up session with the Scrutiny Panel, we asked those who participated in the secret shopper exercise what advice or recommendations they would make to Taff and our Customer Service Team.
- 4.9 The Script
- 4.9.1 Each session started with brief introductions, and then an outline of the purpose of the session. One of our participants had worked in the grocery and catering sector and had experience of how a secret shopper session operated and its purpose.
- 4.9.2 The key messages were:
- The secret shopper sessions are an opportunity for the customer services team to get some feedback on how they are delivering this service.
  - An opportunity for Taff to see where if appropriate Taff can improve customer services.
  - Importantly this was not to trick Taff Customer Service team but rather to offer some insights into how our customers experience the service.
- 4.10 Caveats
- The facilitators had to intervene in one of the secret shoppers real on-going issues. It is linked to the sewage pipe example.
  - This is a snapshot in time so caution should be used in interpreting or conflating the results.

## 5.0 General comments

5.1 The overall feedback from our secret shoppers was positive and that the customer service responses were polite and on the whole information was relevant. The areas where some improvement can be made were timeliness in responding to an ongoing issue, tone, and understanding the urgency of the issue.

5.2 This is with reference to our secret shoppers, some of whom present with complex and diverse needs. And where the presenting issues may cause greater distress than experienced by the general population.

## 6.0 Insights

### 6.1 Operational Response

6.1.1 Response times to calls.

6.1.2 The average wait time to answer calls in the first session was 1-2 minutes and in the second session the average wait time was 30 secs or less, however response times were longer between 12.00pm -1.00pm by around 6 minutes. We had one call that took eight minutes to answer:

- There appeared to be a longer response time over the lunch break compared to the morning, or afternoon calls.
- While the customer services team response time to our secret shoppers' requests varied, on the whole responses were within a couple of hours of contacting the customer service centre. This was via text messages and return phone calls.
- We also have examples of where the Customer Service person, in this case receptionist, responded both appropriately and in a timely manner.

### 6.2 Behavioural / attitudinal response

6.2.1 Overall, most of the secret shoppers felt the tone and approach of the customer service desk and reception was friendly and empathetic. Most if not all customer service responses:

- Identified who they were and how they could help
- Asked whether there was anything else the secret shopper needed help with
- When the Customer Service person was unsure sought clarification on the presenting issue
- When appointment dates had been provided to the tenants, the Customer Service clearly confirmed the dates and time
- The work was scheduled in line with expectations
- In most cases they did thank the caller but not all (there was one exception where the Customer Service did not thank the caller)

- 6.2.2 Some questions that were not asked and would have identified specific needs of the secret shopper included:
- Confirming name of the occupant, occupancy (i.e. single, family, are there children) – this would be an opportunity to update the tenant’s profile information
  - Whether they had any specific needs or support – this could help identify whether the secret shopper's situation had changed

### 6.3 Overly familiar

- 6.3.1 Being overly familiar - this took a couple of forms, in one example the Customer Service person assumed they knew the secret shopper without checking first (they recognised them through their voice) that this was the person they were talking too.

*“Don’t assume just because you think you hear my voice it's me, check first”*

- 6.3.2 For some secret shoppers it was the use of certain phrases, although other secret shoppers were comfortable with this particular phrase

*“Stop calling people lovely”*

*“I’m not anyone's lovely or lovey and never will be”*

- 6.3.3 While the secret shoppers appreciated a warm and open response there is a fine line and balance to managing calls in a professional and yet empathetic manner.

### 6.4 The importance of being engaged

- 6.4.1 Tone and feeling/hearing that the Customer Service person is interested in what the secret shopper had to say was important to the secret shoppers, even if the issue had been on-going for some time. On the one occasion, set out below, when this did not happen, the secret shopper experience was one where it felt dismissive, and that their experience was not important.

- 6.4.2 As an example, the presenting issue was one of overcrowding which had been on-going for several years. The observation from the group was the Customer Service person sounded disinterested in what the mystery shopper was trying to say to them about their experience. While the information shared by the Customer Service person was accurate there was no further exploration of other options nor checking if their circumstances had changed i.e. additional people living in the property.

- 6.4.3 The request to be referred to a housing officer had to be initiated by the secret shopper and not the Customer Service person. The mystery shopper felt dismissed and not listened to.

## 6.5 Assumptions and urgency

6.5.1 Sometimes assumptions can be made about how the secret shopper was coping with a particular issue. For some of our secret shoppers they can be reticent about complaining and how much distress the issue was causing them.

6.5.2 For example, a real, on-going issue involved a problem with a secret shopper's toilet, where sewage from another property was being flushed through their toilet system. This issue had been logged, and the secret shopper is waiting for the issue to be resolved. The response from the team that the issue is currently with the with the contractor. The Customer Service person did not recognise the urgency of this issue nor the distress this was causing the secret shopper.

6.5.3 The facilitator had to intervene and advocate for the secret shopper at the end of the phone call as the secret shopper was struggling to get the urgency of the situation across to the team and how distressing it was for them. The response from the team was that the secret shopper appeared to be ok with the situation.

6.5.4 In another example the secret shopper had come into reception on more than one occasion during December to report that the key he had for his medicine cabinet was not locking the cabinet. This had caused the secret shopper some distress and agitation. It has recently been resolved. Please see appendix three for a case study on this particular example

## 7.0 **Communication and accessibility (link to diversity and inclusion)**

7.1 In two of our mystery shoppers calls there was a lack of communication about the mystery shoppers' disability on file and in one instance, where the contractor when asked to text the mystery shopper because they are profoundly deaf, and won't hear a phone call, said they may or may not be able to do that. Please see appendix two for a case study on this particular secret shopper.

*"Not all disabilities are visible "*

*"If it's good enough for Tesco to text you why can't our contractors do that "*

## 8.0 **Secret Shopper - experience and reception**

8.1 For those secret shoppers who contacted reception they found the receptionist to be professional and polite. The receptionist showed empathy by acknowledging the distress the person was feeling and apologetic that the issue had not been resolved. The receptionist offered alternative solutions to help resolve the presenting issues.

8.2 The exception was one of our secret shoppers' pieces of information had not been logged at reception when they first came in. They had to then repeat the information. Please note recommendation three.

### 8.3 Good practice

- 8.3.1 An example of good practice where the response was both timely and where the correct procedure was followed. The secret shopper in this example used a sample scenario.
- 8.3.2 The secret shopper went into the reception to report that the window of his flat had been broken, and he believed it was Anti-social Behaviour. He requested that he wanted to speak to his Housing Officer. The receptionist was very sympathetic and understanding and assured secret shopper she would help resolve his issue.
- 8.3.3 The receptionist took all the details from the secret shopper and called the housing officer. The housing officer for the secret shopper was not available, the housing officer on duty, explained to the reception to advise the secret shopper to report it to the police and someone from the neighbourhood team will call him on the day.
- 8.3.4 Reception was advised that this was part of a secret shopper exercise and requested that reception also inform the on-duty Housing Officer.

### 9.0 **Being Customer Centric**

- 9.1 Taff has a commitment to ensuring their customers are at the centre of everything they do. Part of that commitment is understanding who Taff's customers are and what works best for them.
- 9.2 The secret shopper exercise gives Taff rich insights into the lived experience of our customers and how they experience our Customer Services. This in turn provides Taff with opportunities to continuously improve the services Taff provide. Small changes collectively can have a positive and significant impact on our customers experience.

*“Always explain what you are going to do, when you are going to do it and when we can expect a response - and especially if you are going to talk to someone while we are waiting on the phone, this doesn't always happen, remember we can't see what you have in front of you”*

### 10.0 **Being Customer Centric**

- 10.1 This report has been shared with operation and strategic leaders involved in delivering services to customers. They have responded to the recommendations, and these are outlined in Appendix C.

**Appendix C - Scrutiny Panel – Customer Services Mystery Shopping – Management Response**

<b>Recommendation one</b> – Taff to explore opportunities to include the customer “lived experience” in Taff’s training, induction and onboarding for our customer facing roles.				
<b>Accepted?</b>	<b>Management Response</b>	<b>Action</b>	<b>Responsibility</b>	<b>By when</b>
Yes	We believe this is an excellent suggestion and done well, will bring the customer experience to life for those who deliver direct customer services. We also appreciate the offer from the SP to help design and deliver the sessions. We recognise that issues brought up in the report about tone and engagement can be improved by increasing the level of empathy with our customers and understanding their circumstances – we believe this training can help us achieve this.	Create a co-produced training session, to be delivered on an annual basis with colleagues in our customer teams. The training will involve tenants in its creating and delivery.	Customer Experience Partner / Scrutiny Panel	September 2025
<b>Recommendation two</b> - Taff to have up to date information of all their customers on file.				
<b>Accepted?</b>	<b>Management Response</b>	<b>Action</b>	<b>Responsibility</b>	

**Appendix C - Scrutiny Panel – Customer Services Mystery Shopping – Management Response**

Yes	We recognise the importance of ensuring customer service colleagues have easily accessible customer information to hand when handling contacts. Not only does this make the customer feel valued, but ensures a better / more efficient service. We are moving towards presenting a 360 view of the customer, including utilising ‘call popping’ in our teams to display details automatically upon connection of a call. A central part of our revised Customer Experience Strategy will be focussing on	Develop and implement a structured plan to increase the level of customer data we hold, and how we use this data to improve our services.	Exec Dir. People and Places.	November 2025
	knowing our customers better, so our services can flex and be respondent to varying needs. use our new Housing Management system to help us identify where gaps are in our data and complete these.			
<b>Recommendation three – That a hearing loop be put in the reception area.</b>				
<b>Accepted?</b>	<b>Management Response</b>	<b>Action</b>	<b>Responsibility</b>	<b>By when</b>
Yes	We accept the importance of ensuring our services are accessible to all tenants.	Provide hearing loop in reception	Head of Housing and Communities	April 2025
<b>Recommendation four - Consider how best to resource call handling demand</b>				

**Appendix C - Scrutiny Panel – Customer Services Mystery Shopping – Management Response**

Accepted?	Management Response	Action	Responsibility	By When
Partially	We accept the need to flex according to demand. We feel our arrangements in place at the moment adequately offer a high level of service. For example, our average call waiting time is currently under 1 minute. Less than 5% of calls wait more than 5 minutes, and less than 1% more than 10. Our call waiting times are excellent when compared to other sectors. We also ‘front load’ hours to Monday / Tuesday / Wednesdays in Customer Team to account for the busier traffic on those days. Our colleagues need to be able to take lunch - we accept this means that between 12-2	Call wait times will continue to be monitored and reported upon to ensure high performance in this area.	Exec Dir. People and Places	Continuously
	wait times may be a little longer. One option could be to change contracts and utilise shift pattern work – but we do not believe this would be a proportional response to the issue.			
<b>Recommendation five</b> – when procuring for contractors that part of the contractual requirements should be that they align with Taff values.				
Accepted?	Management Response	Action	Responsibility	By when

**Appendix C - Scrutiny Panel – Customer Services Mystery Shopping – Management Response**

Yes	<p>A significant minority of our maintenance work is undertaken by contractors – their conduct/ performance and overall approach to customers reflects upon Taff as an organisation. We have recognised we use too many individual contractors and managing their performance has proved challenging and an element of our complaints has been driven by poor contractor performance. We are in the latter stages of procuring a wrap around contract for our maintenance services, that will ensure we have a principle contractor for work beyond capability or capacity of our Repairs Team. Part of the procurement process and upcoming interviews will require the candidates to outline how they will meet our values in the delivery of their work, and it will be an area they are measured against during contract performance meetings. Tenants are also</p>	<p>Ensure the procurement and management of contractors takes account of how well their values match Taff's.</p>	Head of Property	April 2025
	<p>involved in the award and monitoring of this contract.</p>			

- Note – the recommendations accepted in this table will be taken forward as ‘tenant’ audit recommendations and treated inline with our internal audit process.